



Plante Moran Wealth Web Portal and Mobile App Quick Start Guide

1. Set up your account.



Click on the Set Up Account link found in the Plante Moran Wealth: New User Setup email you received. This link will direct you to complete your portal registration. Next, set your security questions, create your password, and accept the user agreement.

plante moran | Wealth Management

Dear Patrick,

Welcome to Plante Moran Wealth. Plante Moran Wealth Management has created a new username Patrick.Timberlake@platemoran.com for you to access your investment information at any time.

Please click on the following to set up your account: You will have 7 days to access, create a password, and login before this temporary link expires.

[Set Up Account](#)

Or, paste this link into your browser:
<https://bd3.bdreporting.com/Auth/PlanteMoran/SignUp/KK1EP1pU-Y9TIK-4oFQybX0X3uGYz8jy>

(This is a temporary link and will expire in 7 days.)

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Set Security Questions

Please pick 3 security questions and their answers for use if you forget your password.

Security Question 1

Answer

Security Question 2

Answer

Security Question 3

Answer

[Next](#)

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Set Password

Please pick a secure password and confirm it.

Password

You must enter a password

Confirm Password

[Back](#) [Next](#)



2. Access via the web.



After you have set up your account using the provided link, you'll be able to access the desktop portal using the button below. We encourage you to bookmark this site for easy access.

**ACCESS THE WEB PORTAL
FOR DESKTOP AND TABLET**

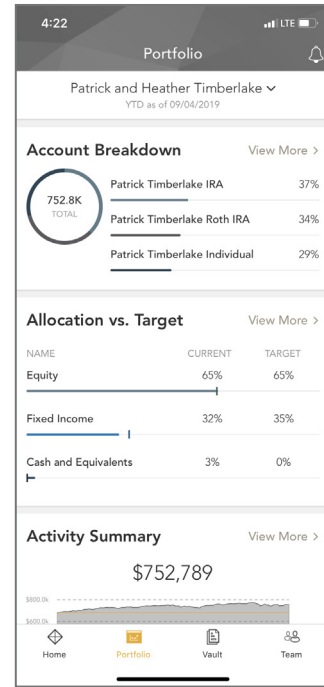
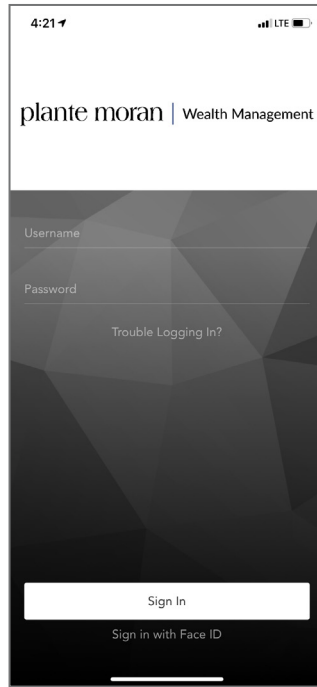
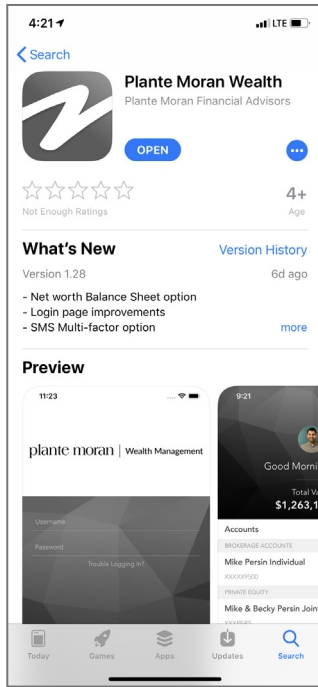
The screenshot shows the login interface for Plante Moran Wealth Management. At the top left is the company logo and name. Below it are two input fields: 'Username' and 'Password'. Each field has a small icon on the right side, likely for password visibility or help. A blue 'Sign In' button is positioned below the password field. At the bottom center, there is a link that says 'Trouble Logging In?'.



3. Access via your mobile device.



To download the app to your mobile device, visit your device's app store and search "Plante Moran Wealth" to install. If you're viewing this presentation on a mobile device, click on the link that corresponds with your device below.



Click the links below to download the app to your device(s).

DOWNLOAD APP
TO MY APPLE® DEVICE

DOWNLOAD APP
TO MY ANDROID™ DEVICE



4. Explore the web portal and mobile app.

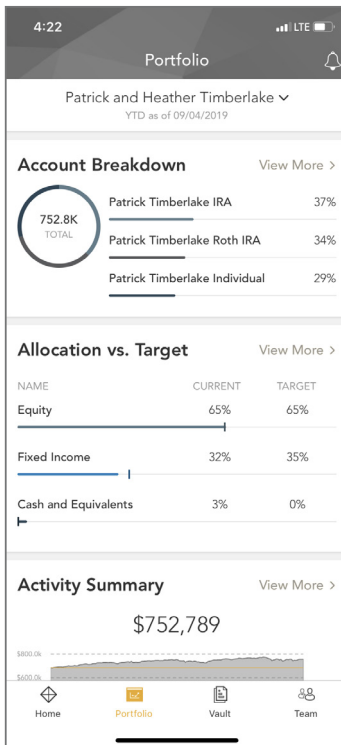


PORTFOLIO DASHBOARD

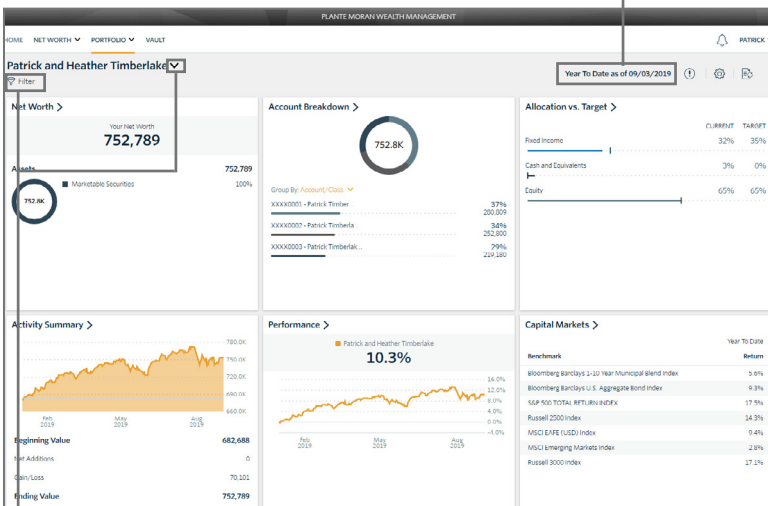
The dashboard provides a centralized location to view your account and portfolio information. To get more details, click on the title of each card or use the drop-down menu to switch between cards. All of this is completely customizable using the filters to select specific date ranges, portfolios, or accounts.

Use the date and time picker to adjust the time period.

MOBILE APP

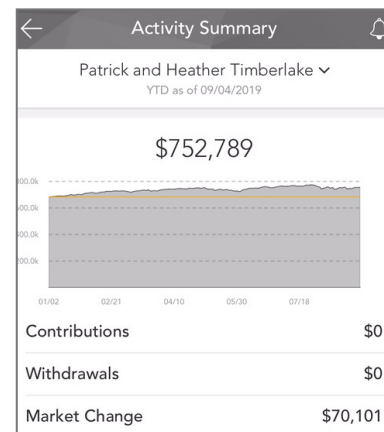


WEB PORTAL



Change your portfolio or filter for specific accounts.

MOBILE APP





4. Explore the web portal and mobile app (cont.).



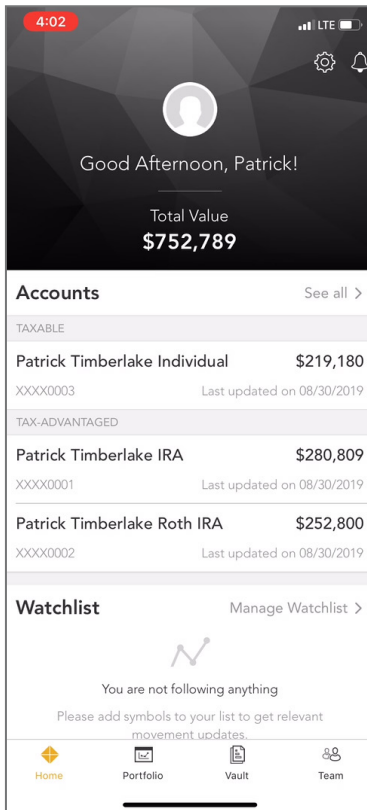
HOMEPAGE

Quickly view your accounts, notifications, preference settings, and connect with your Wealth Management team directly from this page.

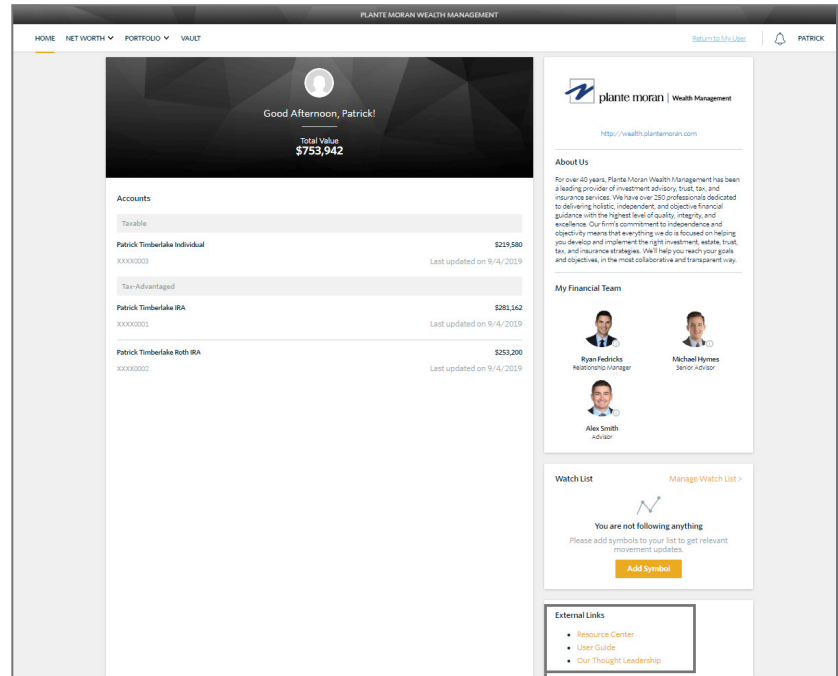
Access helpful video tutorials from our Resource Center and our thought leadership.

Within the mobile app, use the settings-gear icon to adjust your touch and face ID preferences.

MOBILE APP



WEB PORTAL



Access helpful resources directly from the homepage.



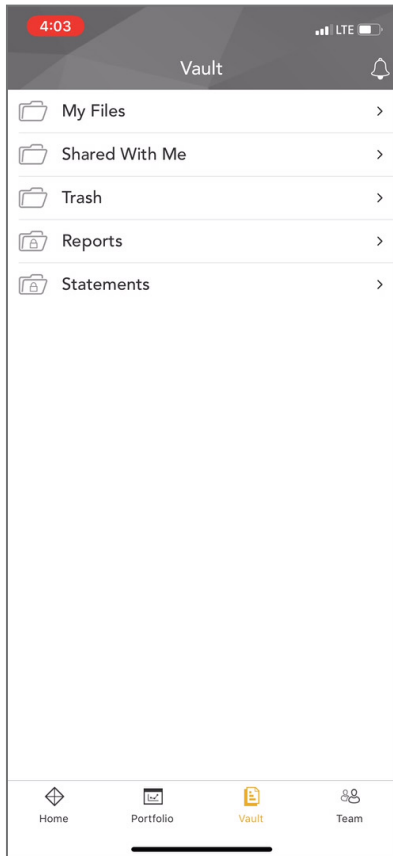
4. Explore the web portal and mobile app (cont.).



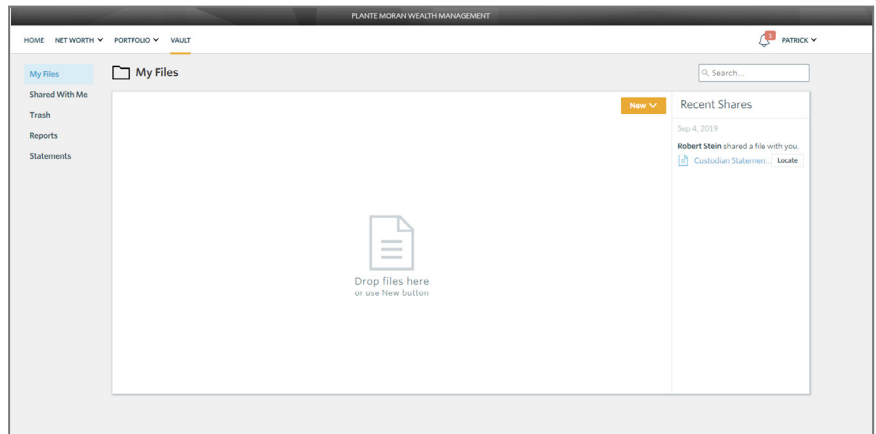
DOCUMENT VAULT

Securely share and manage documents from one convenient location. To upload a document simply drag and drop into the document space. You can organize your documents by simply moving into other folders. The Shared With Me folder provides you quick access to view reports created by PMFA.

MOBILE APP



WEB PORTAL





4. Explore the web portal and mobile app (cont.).



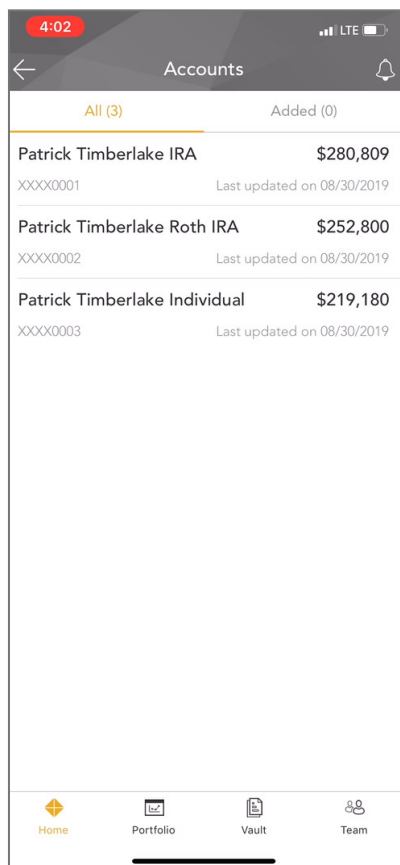
ACCOUNTS

The Accounts page listed under Net Worth features a detailed list of all your accounts and balances. You can expand to see holdings-level details by clicking on the account.

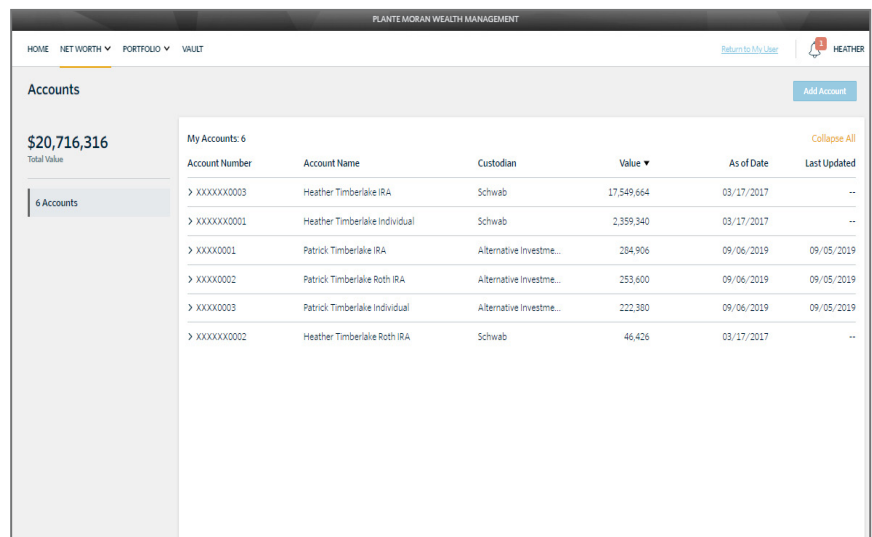
You can also manually create and manage assets and liabilities from this page.

Within the mobile app, you can access your accounts from the home screen.

MOBILE APP



WEB PORTAL





5. Update your balance sheet



After you log in to the portal, navigate to Balance Sheet under Net Worth. The balance sheet will show your accounts, grouped by categories and account ownership.

Name	Allocation %	Custodian	Tax Status	Patrick	Joint	Heather	Other	Total
Net Worth	--			(\$112,986)	\$260,260	\$262,630	\$664,112	\$1,074,016
Assets	100%			\$15,000	\$275,260	\$262,630	\$664,112	\$1,217,002
Cash Accounts	23%			\$15,000		\$262,630		\$277,630
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XXXX0001 - Patrick Timberlake IRA	22%	Alternative Investment	Tax-Deferred			\$262,630		\$262,630
XXXX021-6 - Patrick's Personal Bank Account	1%	Investor Manual Account	Taxable	\$15,000				\$15,000
Marketable Securities	65%				\$275,260		\$514,112	\$789,372
Taxable	42%						\$514,112	\$514,112
XXXX0003 - Patrick Timberlake Individual	42%	Alternative Investment	Taxable				\$514,112	\$514,112
Tax-Advantaged	23%				\$275,260			\$275,260



The balance sheet organizes your accounts by category in rows and ownership in columns.

Total Net Worth								
Name	Allocation %	Custodian	Tax Status	Patrick	Joint	Heather	Other	Total
Net Worth	--			(\$112,986)	\$260,260	\$262,630	\$664,112	\$1,074,016
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Taxable	42%						\$514,112	\$514,112
XXXX0003 - Patrick Timberlake Individual	42%	Alternative Investment	Taxable				\$514,112	\$514,112
Tax-Advantaged	23%				\$275,260			\$275,260



5. Update your balance sheet (cont.)



You can manually add assets and liabilities using the Add Account button. Fill out account information to manually add an asset or liability.

As of 06/05/2020 ↓ Export Add Account

LIABILITIES \$37,500

Asset Type Other Liability

Account Category Liability / Liabilities / Other

Account Name Patrick's Credit Card

Valuation Date 05/06/2020

Note: Valuation date cannot be later than 05/06/2020

Market Value -2,500.00

Add Account



Your account will show up in the balance sheet after selecting Add Account. Edit account attributes by clicking on the account in the balance sheet. You can assign account categories, ownership, and update the market value.

Edit Account ×

Account Name Patrick's Credit Card

Valuation Date 05/06/2020

Note: Valuation date cannot be later than 05/06/2020

Market Value -2,500.00

Account Category Liability / Liabilities / Other

Account Owner
 Sole Joint Trust None

Patrick Timberlake

Relationships Select Relationship



To remove an added asset or liability from your balance sheet, navigate to Net Worth > Accounts > Added Accounts and choose the gear cog icon on the right to remove the account.

Accounts Add Account

\$21,686,127
Total Value

16 Accounts

1 Added Institutions

Manual Account (9)

Account Number	Account Name	Value	As of Date	Last Updated
XXXXXX1-18	123 Shady Lane	300,000	05/19/2020	05/20/2020
XXXXXX1-26	NYC Apartment	150,000	06/08/2020	06/08/2020 Update
XXXXXX1-25	Antique Cars	100,000	06/01/2020	06/02/2020 Remove





6. Resolve any login problems/questions.



HAVING TROUBLE ACCESSING YOUR ACCOUNT?

Follow these steps:

1. Select “Trouble logging in?” on the sign-in page for help.
2. You’ll receive an email with a link to access the site.
Follow the steps provided to resolve login issues.

Username 
Password 
Sign In
[Trouble Logging In?](#)

Trouble logging in?
What's the problem?

I forgot my password.

I forgot my username.

I need to unlock my account.

Please click on the following to reset your password:

Reset Password

If you did not request this password reset, please contact your relationship manager.

Thank you,
Your Plante Moran Wealth Management team

Questions?



If you have any questions, please contact your relationship manager.

For more helpful resources, visit our [Plante Moran Wealth Portal & App Resource Center](#).